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ABSTRACT

A study to explore organizational conditions that facilitate workplace learning involved 35 resource development consultants in Calgary, Alberta, Canada and line staff from 22 organizations in a 9-hour participatory research workshop using Appreciative Inquiry--a technology emphasizing the positive or "life-giving" forces which contribute to a person's ability to be effective in an organization. The workshop format consisted of three separate 3-hour segments. Session 1 activities included naming 235 life-giving forces, grouping them into 17 categories, naming the affirmative topics, and selecting topics related to self-directed learning. Between sessions, the steering committee met to collapse the 17 categories into 7 topic headings. A 42-cell matrix was created to guide examination of the effects of these 7 life-giving forces upon Weisbord's (1976) 6 organizational factors. The second session was devoted to developing "provocative propositions" for each cell. During the final session, participants validated the final "provocative propositions." Using thematic analysis, 10 main propositions or major enhancers of self-directed learning in the workplace were identified: continuous improvement, involving individuals, taking personal responsibility, harmonious values, leadership that sets an example, valuing differences, communication, taking risks, teamwork, and innovation. (Appendixes include a description of the five steps in the Appreciative Inquiry process, information on development of the affirmative topics, 42 provocative propositions, a summary of participant evaluations, and definitions of the 10 organizational enhancers of self-directed learning. Contains 21 references.) (YLB)

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WORKPLACE FACTORS WHICH ENHANCE SELF-DIRECTED LEARNING

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WORKPLACE FACTORS WHICH ENHANCE SELF-DIRECTED LEARNING

A Report of a Project on Self-Directed Learning in the Workplace

Presented to the Seventh International Symposium on Self-Directed Learning, January 21-23, 1993, West Palm Beach, FL, USA.

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This project was undertaken in cooperation with ASHROD (Calgary Chapter). It was funded by the Social Sciences and Humanities Research Council and is part of a series of studies by the "Group for Interdisciplinary Research on Autonomy and Training" (GIRAT). GIRAT Co-Researchers are Nicole Tremblay, of Univérsité de Montréal, Roland Foucher of Univérsité du Québec, Alain Goselin of Univérsité de Montréal, and Morris Baskett of The University of Calgary. Those interested in further information or discussion about this project are invited to write to the author, H.K. Morris Baskett, Faculty of Continuing Education, The University of Calgary, Calgary, Alberta, Canada. T2N 1N4. Telephone (403) 220-4714.

INTRODUCTION

Two streams of enquiry in adult education are converging at this time in history. The first is workplace learning and the other is self-directed learning. Together, these concepts offer immense promise and usefulness, and simultaneously pose difficult conceptual issues.

Learning in the Workplace

Rapid changes in the way in which work is becoming structured, brought about by chaotic changes in an increasingly interdependent global village, are making ineffectual traditional approaches to helping employees gain the knowledge and skills they need. In order to meet the rapid and unanticipated changes in the global market-place in progressively shorter periods of time (Peters, 1992), workers are now expected to have skills to identify, develop and apply whatever knowledge is required to do the job (Carnevale, and others, 1988). The weight of responsibility for learning is being passed from the work organization to the employee working alone or in groups in that organization. When

coupled with the growing demand for 'knowledge workers' as opposed to 'hand workers', the need for continuous workplace learning is paramount (Government of Canada, 1991).

There has also been a revolution in how we have come to understand workplace learning. Originally thought to be closely linked to training, opinion and studies (Marsick, 1987; Zemke, 1985) have shown that most work-related learning occurs informally and incidentally (Marsick and Watkins, 1991) and is self-directed (Tough, 1978; Dechant, 1990). Formal training is thought to contribute from 17 to 20 percent to what workers need to know to do their job. Unlike learning which occurs from formally arranged means, workplace learning is intricately interwoven into the work fabric, and is difficult to distinguish from 'work' because it is embedded in work experience. For example, some of the most useful learning occurs in committee meetings (Beyerman, 1990), as a result of unpleasantness and distress (Snell, 1989), taking on unfamiliar and challenging tasks (McCall et al., 1988) and through interaction with supervisors, colleagues and customers (Lockyer, Parboosingh, McDougall and Chugh, 1985); Baskett and Marsick, 1992)

Self-Directed Learning

Because at least a portion of workplace learning has become associated with the concept of self-directed work brought on by the aforementioned changes in the workplace, it is enticing to assume that workplace learning is akin to self-directed learning. Considerable difficulties exist, however, if one unquestioningly accepts such an assumption. One of the problems is that there exists much conceptual confusion about what self-directed learning is (Oddi, 1987). Also, self-directed learning can be mistakenly viewed as being

synonymous with self-directed work teams, a phenomenon resulting from other changes in the structure of work in organizations during the past decade or so. The idea of self-directed learning also has considerable ideological appeal, and is often aligned with the notion of autonomy (Chene, 1983) and freedom. Frequently, the result of discussing self-directed learning in the context of the workplace is that a greater degree of freedom is attributed to the learner to chose when, what, why, where and how to learn than actually occurs in workplace learning. The real constraints of the organization on the autonomy of the learner can be easily underestimated.

In the case of workplace learning, the organizational context is the key determinant of where, what, why, when and how something is learned. As Chene (1983) pointed out in regards to understanding the relation of autonomy to self-directed learning.

> "Furthermore, and this has been noticed by Dominice (1979), the conditions of the institution (when this factor applies), the content requirements related to a profession, and personal characteristics will determine the power that learners may have over their learning activity" (p. 42).

As used in the literature, self-directed learning implies a much higher degree of control over all aspects of learning than the organizational setting allows. Foucher and Tremblay (1993) point out that there are three dimensions to be considered when discussing self-directed learning in the workplace: initiative, planning and autonomy. Self-directed on-the-job learning can mean that the individual takes the initiative and does the planning, but the autonomy to choose how, when, why, what and where to learn is still basically determined as a result of being an employee and as a result of such other factors as the task

to be achieved, deadlines, available time and resources, and relationships with other employees, to name a few. In the case of incidental workplace learning (Schon,1984; Marsick and Watkins, 1990) where learning occurs as a result of doing something else, factors of autonomy, planning and initiative may not be applicable. The dimension of intentionality, that is, whether or not the individual is conscious of a need to learn and sets about to achieve this maybe useful here. Such a notion incorporates both planning and initiative.

THE PROJECT

Recognizing that workplace learning has, for reasons of economic and social well being, become of critical importance in contemporary society, the Group for Interdisciplinary Research on Autonomy and Training (GIRAT)[1] has undertaken a series of studies to better understand this phenomenon.

One of those studies was to explore organizational conditions which facilitate workplace learning. This paper discusses the results of that study, which involved thirty-five human resource development consultants and line staff from twenty-two different organizations in a nine-hour participatory research project utilizing Appreciative Inquiry.

Genesis. The author and a research associate initiated the study which was undertaken with the support of the Calgary chapter of the Alberta Society for Human Resource and

[1] GIRAT is funded by the Social Sciences and Humanities Research Council of Canada. Faculty from three universities, Univérsité de Montréal, Univérsité du Quebec a Montreal, and The University of Calgary are co-researchers. They are Nicole Tremblay, Roland Foucher, Alain Goselin and Morris Baskett.

Organization Development (ASHROD). The project was advertised using normal continuing education marketing lists as one of a number of HRD programs for professionals offered by the University of Calgary, and the fee was kept low in order to attract as many participants as possible.

Preconditions. Three preconditions were set by the investigators: an interactive workshop format would be used; participatory research methods would be employed; and if appropriate, Appreciative Inquiry[2] would be used. Appreciative Inquiry had been recently introduced into the local human resource development community and although the investigators knew only the rudiments of this particular approach, it seemed worthwhile pursuing further. The choice of these preconditions was predicated on the belief that the study should be useful to those who participated, as well as to the investigators.

Design. In the initial planning stages, the design was left flexible, in recognition that ifthis project were to involve others, then the design itself would be altered to meet the needs and recommendations of the participants. As a first step, a steering committee of 11 members was selected. Selection criteria included familiarity with workplace learning and representativeness in the field. The target group was human resource development practitioners. Committee members came from the fields of transportation, utilities, oil and

[2] Appreciative Inquiry is based on the principles elaborated by Srivastva and Cooperrider (1990) and developed into a technology by Bushe and Pitman. This particular technology emphasizes the positive, or 'life-giving' forces which contribute to being effective in organizations.

gas, electronics manufacturing, health, private consultants, municipal government, and education.

The steering committee met six times, two before the workshop, three during, and one after. Several sub-group meetings involving some steering committee members were also held. The committee was asked to recommend a general search design, monitor and adjust the program as it developed and as feedback was received, and make recommendations at the conclusion of the project. Committee participation was erratic due to the heavy workloads of committee members, and as a result, some continuity was lost in the planning.

Research Question. A general research question guided this investigation: What factors are perceived by employees to contribute to their self-directed learning in their workplace? Because little could be found in the literature on this particular topic, it was decided to keep the research question broad, and to use methods suitable for an initial investigation, or what Kaplan (1964) refers to as the 'Context of Discovery'.

Research Methods and Program Design. One of the unique aspects of this study was the combined use of a workshop format, participatory methods, and Appreciative Inquiry. Because these were blended in the design, it will be necessary to first describe these three elements. Following that, an overview of the final learning/search process used will be given.

Workshop Format. In pre-selecting a workshop design, the two researchers established three separate three-hour segments held over a three month period, for a total of nine contact hours. The program was advertised to some 2500 human resource development professionals in Alberta, Canada. The actual content of the three-hour segments was worked out with the steering committee.

Two factors figured in pre-setting the times. One was available time for advertising; the second was to establish a format (workshop) with which potential participants were familiar, and which would be seen as a useful mode of learning to them. The alternate, that of a survey or interviews to collect data, was discarded because it would contribute to the image of research as one-way from which the subjects would receive little benefit.

As a result of discussions with the steering committee, two sets of objectives were outlined, and presented to the participants at the first session:

Researcher's Objectives:

1. gather data on self-directed learning in the workplace as experienced by participants;
2. identify conditions which enhance self-directed learning in the workplace;
3. describe how the enhancing conditions operate;
4. suggest ways to increase opportunities for self-directed learning in the workplace.

Participant's Objectives:

1. be able to apply new understandings about workplace knowledge and skills required;

2. increase understanding of workplace factors which influence self-directed learning;

3. desire to learn about appreciative inquiry.

Participatory research. To increase the usefulness of the study to the participants, the general methodology selected was participatory research. Based on a constructivist perspective in which it is assumed that each participant will make unique sense of their learning experience, and that it is impossible to gain 'objective' data, the researchers chose to seek a degree of intersubject agreement as the criteria for valid data, while at the same time seeking to involve the participants in an empowering process whereby they could find the experience useful for themselves and for their own worklife. According to Merriam and Simpson (1984), participatory research empowers the 'subjects' and helps to make the research results useable.

Participatory research involves three interrelated processes: collective investigation, collective analysis, and collective action(Merriam and Simpson, 1984). In this project, the first two processes were fulfilled, while the last(collective action) was not. At the completion of the analysis, participants were encouraged to apply what they came to understand about self-directed workplace learning to their individual workplaces, but collective action was not possible.

Appreciative Inquiry. Appreciative Inquiry (A.I.) is a participatory method designed to empower the participants. A.I. was developed as a reaction to action research , which is usually employed in organization development, in which 'problems' are identified and solutions sought. The tone of such an approach, argue Cooperrider and Srivastva (1990),

is decidedly negative, focusing only on 'what is', and the net effect is demoralizing to the organization. By contrast, the XA.Iapproach to facilitating learning and organizational change is to open up the world of the possible, to help empower employees, and to appreciate the best of 'what can be'. In organizations, there are 'peak experiences' to which members point as being outstanding, and which have contributed immensely to theirs or the organization's effectiveness. The conditions which lead to such peak experiences are described as 'life-giving' forces.

A.I. proponents argue that rather than seek solutions to problems, one can identify those life-giving forces which lead to effective change and learning, and attempt to replicate them. The emphasis here is on the positive, the innovative, the possible rather than the problematic.

Because of the precondition set by the researchers that the methodology should be conducive to helping the stakeholders learn throughout the research process, A.I. was investigated further. Although not all of the steering committee were in agreement, it was chosen as the approach to be used in this venture. Appendix A contains a brief overview of the steps used in A.I..

PROGRAM SEQUENCE

Based on the three cornerstones of workshop format, Appreciative Inquiry, and participatory research, and as a result of input from the steering committee, a final program was derived. It should be emphasized that this design was constantly in flux, and underwent numerous adjustments. sometimes on the spot, as a consequence of continuous feedback from the participants.

DAY ONE

Naming the Life-Giving Forces. Following orientation and introductions, thirty-six participants were broken into groups of threes, with one 'Story-Teller', one 'Questioner-recorder', and one 'Observer'. The story-teller was asked to describe an experience in which they were able to learn something powerful or worthwhile. They were to identify what they learned, how they went about it, and the conditions surrounding the learning. Recorders used key words to sum up the main idea on large "Postit notes" (not less than three and not more than seven words). Observers noted the whole process and during the discussions, shared their observations. Members rotated through all positions so that each small group member had an opportunity to present their experiences. Examples of 'life-giving forces' from this phase included "taking initiative to learn", "working in teams", and "motivated by changes in technology". Two hundred and thirty-five separate statements were generated, or 6.7 per particpant.

Affinity Charting. Participants then took their completed 'Postits' and placed them on a large blank wall. Everyone was asked to group the responses by sticking like responses together. This took approximately 30 minutes, and in the end, the postits were grouped into 17 different categories.

Naming the Affirmative Topics. According to the procedures developed by Pitman and Bushe, a facilitator then reconvenes the entire group, and through a consensus process, each category is titled. The object is to condense the material to about 6 major themes. In this project, participants naturally began naming the categories early on as a part of the sorting process so consequent titling was unnecessary.

Selecting topics related to self-directed learning. The topics were scanned to determine if all could be related to self-directed learning in the workplace. Although in other experiences, some topics may be eliminated, in this project, all of the topics were considered relevant.

Closure. To provide a sense of closure to the first day, the progress was reviewed and the major learnings were identified. It was evident that participants were not clear about the process and expressed concern about whether they were going to achieve an understanding of self-directed learning in the workplace. This feedback was taken into consideration in planning the Day Two program. The next steps in

the process were outlined, and participants were invited to attend the next steering meeting to provide input into the process.

Steering Committee Meetings Three and Four

Between sessions, the steering committee and some other participants met to review the process, to suggest changes, and to recommend the main topics to be used in the next phase. The seventeen headings were eventually collapsed to seven topic headings which the committee felt encapsulated the 'life-giving' forces identified in the first session. These were (1) valued what was learned; (2) learning with and from others; (3) being excited and stimulated; (4) external challenges and pressures; (5) awareness of self and others; (6) having freedom, control and/or choice; and (7) learned in different ways.

The next step in the process was to consider these seven forces in relation to the organization. Weisbord's (1976) six-box model of organizational factors was selected by the steering committee. Its six factors were seen as usual categories relating to self-directed learning.

A 42-cell matrix was created to guide examination of the effects of the seven life-giving forces upon the six organizational factors (Figure 1). This matrix, together with the seven topics, with the relevant participant statements listed under each topic them were sent to all those involved prior to the next session.(Appendix B).

DAY TWO

The second plenary session, which was held four weeks after the first meeting, was devoted to developing "Provocative Propositions" for each of the forty-two cells. A provocative proposition was described to the participants as "..a statement that bridges the 'best of what is' with your own speculation or intuition of 'what might be'." It is provocative in that it takes isolated incidents and extrapolates them to imagine what the organization would be like if it adopted this particular proposition throughout the organization.

Propositions are written as if they were already true and happening fully in the organization. The intent was to encourage those involved in the project to think in terms of ideals which are embodied in the Life-Giving Forces developed from their collective experience. While not representing any specific situation, they project the best possible conditions arising from the collective experience, and are thus grounded in experience.

MATRIX

WEISBORD'S 6-BOX MODEL
ORGANIZATIONAL FACTORS

LIFE-GIVING FORCES FOR LEARNING	Purpose	Structure	Relationships	Rewards	Leadership	Helpful Mechanisms
Having freedom, control, &/or choice						
Learning with & from others						
External challenges & pressures						
Being excited & stimulated						
Awareness of self & others						
Valued what was learned						
Learned in different ways						

Figure 1

Working the Walls. Forty-two sheets of newsprint were posted on the walls, each relating to a cell. For example, one cell was entitled "Purpose/freedom, control and or choice". Groups of 5 or 6 were assigned a section of the wall and asked to identify a "Peak Experience" which they had at work which combined the two factors identified. Using a process similar to that of the first day, statements of peak experiences were written on large "Postits" and these were affixed to that particular sheet of newsprint. Through rotation, each group had an opportunity to 'work' fourteen different cells.

Not all members of all groups identified peak experiences which reflected the interaction between the life-giving forces of self-directed learning and each of the six factors of organizational life for each cell. However, at the end of the process for the day, each cell had at least three "Postits" attached to it and most participants had covered 14 of the forty-two cells.

Steering Committee Meeting Five and Six

Members of the steering committee, together with several other participant volunteers, met twice to fashion the results of "Working the Walls" into final "Provocative Propositions" which would reflect the input of the group. The resultant propositions are in Appendix C. For example, the final proposition for the cell in which the organizational factor of "Relationships" and the life-giving force of "Having freedom, control and/or choice" converged, was

"People at all levels feel secure to question, discuss and provide input on any aspect of the business."

DAY THREE

"Remembering our future". On this final day, participants were invited to provide validation to the final "Provocative Propositions" which had been developed in the intervening three weeks, to identify some actions which they might take in their organizations as a result of their experiences in the project, and to evaluate the project.

To validate the propositions, each statement was affixed to the wall, together with three five-point rating scales(See example in Appendix D). On the first scale individuals were asked to rate their organizations on the extent to which the proposition characterized their organization. On the second scale they were asked to rate the statement on the extent to which it represented an ideal which should be pursued by organizations to enhance self-directed learning. On the third scale, participants were asked to indicate the difference between their first and second rating(using this method, it was not possible for the researchers to ascertain individual response discrepancies unless the participants did this for each of their answers). Twenty-four individuals were present at this session, and responses to each question ranged from 21 to 24, suggesting that some people could not complete all of the 42 statements. Given that each statement required 3 ratings, each person was expected to complete 126 ratings, which was a formidable task in itself. The

intention in gaining ratings in this manner was enable all individuals to notice differences, remarkable ratings, to 'own' the data, and to reflect on its implications for their own organization. For example, it might be possible for individuals from one organization to note that there was a much larger gap between the ideal and the actual in their organization when compared to the group ratings.

During this process, which took approximately 60 minutes, steering committee members were asked to circulate and to observe anything remarkable, for example, those in which there was a higher than average discrepancy between the actual and the ideal state. Following the validation exercise, members were asked to review the results on the walls, and then the group re-convened to identify some of the highlights as they had experienced them, and to note any significant trends, and individual learnings.

"Amplifying our Vitality". Those attending this final session were then invited to join with others who had similar interests, and to discuss how they might turn the propositions into action plans. They were asked to report these plans to the entire group. Fifty minutes was devoted to this exercise, and fifteen minutes allotted for the report-backs. In this project, members divided into four separate groups, two groups being comprised of members from the same company, one group of consultants, and another group which focused on how to get organizations to take action.

Defining Self-Directed Learning in the Workplace. During the early meetings of the steering committee it became apparent that each individual had a different understanding of what self-directed learning in the workplace was all about. Some viewed it as an extension of pre-arranged courses and training sessions, other saw it as independent and outside of organizational responsibilities, and still others viewed it as related to self-managing teams.

Rather than impose a definition upon the group, the decision was taken to allow each person to define it in an operational way, and to have them reflect on how they used the concept, and what changes occurred in their concept, once they had completed the program. During the final meeting, the four task groups were asked to define self-directed learning in the workplace. All groups indicated that they saw it as primarily individually initiated and individually managed, thus reinforcing Foucher and Tremblay's (1993) characterization. Ideally, self-directed learning was encouraged by the organization, but not necessarily so. No one suggested that the organization had a powerful role in mediating learning. One group distinguished it from organization-initiated training, which was organization dependent, and other-directed (See Figure 2).

Figure 2

Relation of Self-Directed Learning in the Workplace to the Organization:

A Representation

	Organization Dependent	Organization Independent
Other Directed	Training	Formal Education
Self-Directed	Educational Support from the Organization	Self-Directed Learning

ASSESSMENT OF THE PROGRAM

Appendix E contains the summary of the evaluations and the evaluation form used. These data, as well as their own experiences in the process were reviewed by the steering committee in two final meetings. Several conclusions were drawn:

1. It became apparent in the evaluations that there were two different sets of expectations by participants. Those who were from organizations seemed primarily interested in finding a means to improve the climate for self-directed learning in the workplace. However, several independent human resource consultants were more interested in understanding how the A.I. method and the concept of self-directed learning could be used in their consulting work.

2. The process may have been too complex for the time available and the difficulty in conceptualizing self-directed learning in the workplace. Many saw A.I as the focus of the inquiry, rather than self-directed learning.

3. A high degree of participation and engagement was evident by those who attended all three of the meetings. However, there was a fallout (35 attended the first meeting, and only 25 attended the third meeting) and this could have been due to high demands for participation as well as the complexity of the process.

4. As an experiment in making research available and useful to the community, this project was successful. For some, the experience confirmed the importance of self-directed learning in the workplace, but added few new ideas of significance. The experience permitted others to become aware and interested in an area which had heretofore been difficult to comprehend. The process itself also emphasized that

each individual has experience which is useful to understanding the self-directed learning in the workplace, and as well, to see that research is not necessarily something which is 'done' to others, that is, it can be a collaborative process in which the collective experience of those involved is useful data.

5. Participants from two companies reviewed the process as a group. One reported that while they saw the experience as engaging, they could not identify explicit learnings which they gained and which could be directly applied to their workplace as a result of the process.

The representatives from the second organization identified a number of usages from both the A.I. approach, and their increased appreciation of self-directed learning in workplace. These included comparing the provocative propositions against their organization's practices to establish priorities, creating an environment through the company leadership in order to induce self-directed learning automatically in the organizational culture, and incorporating coaching/mentoring into the organizational culture and practices in order to facilitate self-directed learning.

6. The concept of self-directed learning in the workplace lacks clarity and specificity. Examples of self-directed learning need to be collected. This is an important area for future study. It is apparent, as one moves from planned and 'other-directed' learning to informal learning and incidental learning embedded in experience, the visibility and distinctiveness of learning as a separate act diminishes.

A model which characterized the essence of self-directed learning in the workplace would be helpful.

ASSESSMENT OF THE FINDINGS

The main focus of this study was to gain data as to what were perceived as organizational enhancers to self-directed learning in the workplace. A secondary focus, but one which at times overshadowed the main purpose, was to collect data in such a manner that, in addition to meeting the needs of the researchers, those involved would gain from the experience as well.

A number of different sources of data were used to develop a rudimentary understanding of organizational forces which enhanced self-directed learning in the workplace. Information about how the concept of self-directed learning in the workplace was understood was received first from the steering committee, and at the end of the process, from the participants. The list of 'life-giving forces', which was developed during Day One enabled the researchers and the steering committee to gain an initial sense of what factors were perceived by the participants to support self-directed workplace learning.

The seventeen categories of life-giving forces(subsequently reduced to seven themes) were validated as representing the experiences of the participants as a result of feedback and involvement in the process. Finally, the forty-two 'provocative propositions' which were developed as a result of 'Working the Walls', received affirmation as valid statements representing the experience of the participants as a result of the consequent "Remembering our Future" exercise on Day Three.

At its final meeting, the steering committee examined the results of the validation of the "Provocative Propositions" on Day Three. T-tests had been performed on the descrepancy scores and all but one of the forty-two discrepancy ratings was found to be statistically significant at the .05 level.

Two qualitative analyses were undertaken. In one attempt, the propositions were arrayed on a two by two matrix with degree of importance on the vertical and degree to which the organization was performing these functions well on the horizontal. The results were not seen as terribly useful.

Using thematic analysis, the Research Associate identified the main propositions under eleven themes. Time did not permit further analysis by the committee, however, this thematic classification was consequently reviewed by the author, and accepted as a good fit for a rudimentary representation of the forty-two provocative propositions. The themes were subsequently reduced to 10, and these are presented in Appendix F.

The ten major enhancers of self-directed learning in the workplace were (1) embracing a continuous improvement approach, (2) high individual involvement, (3) taking personal responsibility, (4) compatibility between individual and organizational values, (5) leadership which sets an example, (6) valuing differences, (7) effective communications in the organization, (8) support for risk-taking, (9) teamwork, and (10) encouraging innovation.

DISCUSSION

In retrospect, this undertaking was both risky, and highly productive. From the standpoint of knowledge utilization, many lessons were learned about how one could involve

'subjects' of research in a creative and collaborative search for understanding everyday phenomena. The importance of finding a simple, but useful process was underscored in this project, the lessons being in the case of the negative. One clear message gained was that the process, while exciting, was highly complex and may have interfered with the data collection process. One could ask if similar results, using a less complex design, would be reached. On the other hand, the constant reference back to the data generated by the participants throughout the program, even though it was condensed into themes and categories by sub-groups, suggests that there is at least some experiential validity to the propositions.

It became obvious that while the practice of validating the provocative propositions on a group basis during Day Three was valuable to the process, it may also have been a major threat to validity in that raters would be highly influenced by the assessment of other raters. As a follow-up, the same participants will be asked to independently rate the propositions several months later to ascertain if similar results can be obtained.

The ten derived organizational enhancers for self-directed learning, as displayed in Appendix F can be verified by other means. First, several human resource development specialists who have examined them have said that the same enhancers are cited in textbooks as indices for healthy organizations. This may further make the point that much self-directed learning in the workplace is so embedded in everyday experience, and thus is highly contextual, that it is difficult or impossible for analysis purposes to extricate workplace learning from work in general. Second, this list of ten enhancers has many

similarities to a self-administered inventory developed by Marsick and Watkins (personal discussions) to diagnose effective learning organizations.

CONCLUSIONS AND FUTURE DIRECTIONS

The value of investigating workplace learning is intensified by the possible economic and social implications of understanding this phenomenon. Self-directed learning in the workplace is an area of fertile investigation, one which, as Foucher and Tremblay(1993) point out, lacks a suitable and universally accepted language to even discuss it.

Several directions for future research are suggested as a result of this project. There is a need to develop a commonly-held definition of self-directed learning in the workplace, and to compare and distinguish the concept from such concepts as informal and incidental learning, learning-how-to learn and reflection-in-action. It may well be that each investigator is examining the same elephant. Foucher and Tremblay (1993) have begun to make inroads into this area, and much more needs to be done. It is likely that there will be a number of competing definitions due to the differing perspectives which researchers bring to this field.

A second direction is to expand our understanding of conditions which enhance self-directed learning in the workplace, and to seek ways in which employees can be helped to take responsibility and develop skills to be effective learners in the work setting. In order to do this, we will need to better understand the anatomy of learning in the workplace. This

will require a close analysis of the world of the worker-learner, and how they make sense out of that world. Self-reports, participant-observation, case studies, and the like are needed to gain a more holistic grasp of this phenomenon.

A third fruitful area of investigation is the notion of participatory research in which the learner becomes a co-investigator into their own workplace learning. Such approaches add contextual richness to research, while at the same time enabling the participants in the research to benefit from the process.

This project sought to gain some parameters around how self-directed learning could be enhanced in the workplace, while at the same time helping those who provided the data with a process that empowered them as learners and employees. Much remains to be understood about both self-directed learning in the workplace and empowering approaches to researching the subject.

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APPENDIX A

FIVE STEPS OF THE APPRECIATIVE INQUIRY PROCESS

FIVE STEPS OF THE APPRECIATIVE INQUIRY PROCESS

1. Naming the Life-Giving Forces

   The objective was to identify the key factors involved in SDL. Participants broke into trios to interview each other about peak learning experiences. Notes were made about those factors or conditions which made it a peak experience. Everyone's notes were placed on the wall and an affinity charting process was used to sort the factors/conditions into categories which represent the life-giving forces for learning. Names were chosen for each category.

2. Stalking the Light

   This step is a cascading network of interviews that results in everyone in the organization (or department) having the chance to tell their stories about the Life-Giving Forces. This is a mutual inquiry process between the interviewer and interviewee. This step helps to build buy-in and commitment to the change effort.

   (This step was not done in our design)

3. Working the Walls Together

   This step involved creating and examining each cell of a matrix created by combining the Life-Giving Forces and an organizational model. Specific individual information was collected for each cell. This information highlighted how the organization(s) supported or encouraged SDL.

4. Remembering Our Future

   Using the experiences related in Working the Walls Together, participants collectively developed and validated a statement for each cell of the matrix. The statements are called Provocative Propositions and captured the aspirations of the organization based upon the peak experiences of its employees.

5. Amplifying Our Vitality

   In this step, the Provocative Propositions were transformed into action steps.
   (This step was modified in our design)

APPENDIX B

DEVELOPMENT OF AFFIRMATIVE TOPICS

THE UNIVERSITY OF CALGARY

INTER·OFFICE

TO: **Participants in "Self-Directed Learning in Organizations: An Enquiry"**

FROM: Jan Dixon, Facilitator DATE: 92-04-30

You worked very hard in Session 2 to produce lots of good information. I think you will like what you see as you go through the data enclosed.

In session 2 we combined the Life-Giving Forces of Learning and an organizational model to form a matrix so that we could go about our inquiry in a systematic way. A group of 7 participants got together after Session 2 to begin creating the provocative propositions. Some of the propositions are included with the data. Look over the data and propositions then try to create some of your own.

Included in this package is:

- a description of what the provocative propositions are
- the data from Working the Walls Together, combined with
- some provocative propositions

Just a reminder, our third session will be on:

May 6
Conference Room A, Plus-30 level (Mezzanine)
Western Canadian Place
707 - 8th Ave. S.W.
Calgary, AB

Time: 12:00 to 3:00 p.m. We will start promptly at 12:00
Lunch will be at 11:45.

Parking: There are two Impark Lots on the North side of 9th Ave. between 7th and 8th streets. They charge about $1.25 for each 2 hours. Bring loonies and quarters for the ticket machine. All-day parking is available on the south side of 9th Ave. for $4.50/day.

If you have any questions please call Louise Campbell at 220-4721.

GUIDELINES FOR CREATING PROVOCATIVE PROPOSITIONS

A provocative proposition is a statement that bridges the "best of what is" with your own speculation or intuition of "what might be".

It is provocative in that it takes isolated incidents and extrapolates them to imagine what the organization would be like if it adopted this particular proposition throughout the organization. Propositions are written as if they were already true and happening fully in the organization.

Provocative propositions should speak to the ideals embodied in the Life-Giving Forces developed from the experiences and wisdom of members of the organization.

STEPS IN THE PROCESS

Cycle

- read the comments for one cell
- pick out the themes
- generate a statement that seems to fit the themes
- go over the wording of the statement to be sure it captures the correct tone and ideas (this step can take a lot of time but we will limit the amount of time the committee spends)

Repeat cycle for each cell

- present the propositions to the entire group for validation (this will be done in session III)

WORKING THE WALLS TOGETHER DATA

AND

PROVOCATIVE PROPOSITIONS

PURPOSE

why are we here?, what business are we in?

1. **Having freedom, control and/or choice.**

- personal plus organization purpose
- Can I buy into it? If not, I don't learn.
- purpose of organization can be enacted in a number of ways - leads to more opportunity
- validates other/broad sources of information
- provide opportunities for people to meet purpose in own way
- encourage broader activities in purpose
- purpose clearly articulated and understood so people know what to do and learn

PROPOSITION:

2. **Learning with and from others.**

- organization demands and stresses the importance of change - Continuous improvement
- engaging in redefining organization purpose
- provides a shared motivation and incentive

PROPOSITION: This organization promotes continuous improvement and learning as part of its strategy to define and achieve its purpose.

3. **External challenges and pressures.**

- having a stretch vision that encourages employees to reach
- purpose of organization provided anchor to allow to learn how to cope through turbulent change
- when vision/mission is committed to
- when purpose provides a frame that allows identification of challenges and pressures will itself facilitate learning
- when purpose helps by providing a context to learn how to manage external challenges and pressures
- or use challenges and pressures to your benefit

PROPOSITION: This organization has a "stretch" vision that encourages employees to reach. Employees are committed to the organization's goals.

4. **Being excited and stimulated.**

- clear connection between individual actions and organization - purpose/goals
- when purpose is change and improvement
- when purpose leads you to see gap between how it is and how it could be
- when purpose appeals to higher values
- having a good match between employee and organization - skill and value sets

PROPOSITION: This organization has high congruency between individual and organizational values. People understand how their actions contribute to the organization's goals.

5. **Awareness of self and others.**

- congruence of personal/corporate values
- close match between own purpose and that of the organization
- sharing of common vision promotes acceptance of diversity/views/methods
- creates expectations of others within working relationships
- purpose creates a sense of commitment and level of commitment
- self-examination process. What do I have to give?? (Introspection)
- purpose encouraged conversations of expectations and working relationships

PROPOSITION:

6. **Valued what was learned.**

- sharing the results of work
- organization engages everyone in interpretive vision/purpose
- value learning in purpose/vision statement
- allows individual to identify/accomplish their own goals to meet purpose
- allows people to meet vision in own way
- providing opportunities for people to meet it in own way
- providing opportunities for people to learn what they need to meet purpose
- capture the gain and share results
- providing opportunity to share learnings
- revisit/modify organization purpose based on organization learning
- apply learnings in other environments

PROPOSITION: The organization involves people in defining and interpreting its purpose, and supports them in learning required to meet the purpose. People are encouraged to define individual goals and action plans to that end. The organization regularly reflects on its experience and modifies its purpose accordingly.

7. **Learned in different ways.**

- reason for open-climate not clarified ..led to distrust
- deliberate identification of alternate sources of learning (sites)
- diversification -> created situation where people had to learn more by trial/error instruction etc.
- communicating shifts in purpose
- expanded purpose -> required people to visit other country - a different way
- provide flexibility for people to learn in their own way - what they need to meet purpose

PROPOSITION:

STRUCTURE

examines how work is divided and organized - function, product, program

8. **Having freedom, control and/or choice.**

- focus on the person/or business pulls us together
- flexibility to change time to accomplish plans/goals
- responsible for results of team
- using everyones expertise ("hands on" with all) - focus on product
- cross-training leads to big picture and more opportunity
- set goals
- team structure which brings all resources together leads to broader
- if have individual role, training stops at that role
- if have "family", learning is broader - learn from multiple perspectives
- pride in results
- information -> know re: quality of results
- all key people involved on the product...broader learning
- tight structure made me "edit" myself
- autonomy
- feedback from customers
- project teams... allowed us to own the problem

PROPOSITION: The structure is flexible allowing for the involvement of all stakeholders, while helping people to focus on desired outcomes.

9. **Learning with and from others.**

- not confined to boxes allows crossing boundaries
- have opportunity not tunnel and visioned
- open structures work best for learning with others
- informal
- rotating leadership provides opportunity/have to learn from each other
- informal structure creates opportunity for informal learning
- gives access to various client groups or others
- little structure allows ad hoc as we need it - learning (just-in-time learning)
- structure time is to learn from each other
- serving customer focus necessitates collaborative learning
- organizational development group - capability development group - both with clients

- need to learn from each other so present unified front

PROPOSITION:

10. **External challenges and pressures.**

- group/team responsible for a service/product
- abandon traditional methods, under pressure invent on the fly
- experimenting with different forms of organizational structures and allocation of work

PROPOSITION: This organization's structure adapts and evolves beyond traditional boundaries.

11. **Being excited and stimulated.**

- structure gets employees actively involved
- delegation of responsibility and accountability
- organize work so the employee see the results of your work
- process of redesigning organization is exciting and stimulating
- involving all of organization in strategic planning process/mission statement development
- synergy team or self managing teams - structure for redesign/rightsizing efforts
- recognition that different structures (asymmetry) for different aspects of business if O.K.
- when processes your contributing into become visible
- connection to end - user of your output - job enhancement

PROPOSITION:

12. **Awareness of self and others.**

- up, down all around feedback
- structure aligned with beliefs and values - shifts values
- designing work to foster collaboration
- reduction of hierarchy demands more risk taking
- daycare and EAP, etc. programs communicate values
- when management seeks input from individuals - individuals feel good about self
- suggestion programme put in place - listening
- internal market economy
- use of interdisciplinary task forces
- planning boards system

PROPOSITION: This organization's structure conveys a certain value set which is in harmony with the employees' value sets. Management encourages individual input and multilevel feedback. Work is designed to foster collaboration.

13. **Valued what was learned.**

- loose, informal, non-structured, first name basis, work environment
- organic structure (free flow of information among work units)
- acceptance of ideas and learnings from others (work units) experience

PROPOSITION:

14. **Learned in different ways.**

- given accountability for results
- allowed for diversity of learning methods
- creating multifunctional teams which expose members to a variety of skills
- allowed for diversity of working styles
- freedom to chose how time was spent
- provide autonomy to choose learning methods
- allow a lot of different ways to learn (e.g. class, manual, consult with others, observe
- freedom to allocate resources
- decentralization means people need broader range of learning skills
- structure changes presented opportunity to develop new ways of learning

PROPOSITION:

RELATIONSHIPS

how conflict is managed, and degree of interdependence both formal and informal

15. Having freedom, control and/or choice

- organization supports subordinates questioning hierarchy or upper management
- relationship values input/contributions from all levels
- relationships allows freedom to explore, question
- organization fosters relationships within the team atmosphere by delegating duties and responsibilities
- allowance for self monitoring and self-regulation

PROPOSITION:

16. Learning with and from others.

- establishing ground rules for safe learning
- having a team
- trust
- having a common goals
- commonalities
- different skills, backgrounds, heterogeneity on teams
- egalitarian relationships
- mentors/coaches
- networking
- attitude.. can find out, not protect (looking good)
- knowing what others need/experienced to be able to help
- a latticework - sharing information across departments
- where people can use their "voice" (equality as a person outstrips rank)
- "meetings in the parking lot"
- to be "educative", relationship is equal
- working past being "difficult" (reframe) as problem-solving
- conflict if O.K.

PROPOSITION:

17. **External challenges and pressures.**

- led to solidarity (to work together)
- challenge people to learn from others
- relationships enhanced because we learned together
- challenge people to learn more to beat competitors
- create a more global perspective
- builds a healthy competitive spirit (with external competitors)
- may bring together a special task force to meet a challenge -> learn re: new areas

PROPOSITION:

18. **Being excited and stimulated.**

- Creating coaching and mentoring relationship
- the presence of conflict
- flexible roles
- shared respect - heard and shared experience
- by having to coach others
- multi-directional learning (from each other) (up/down) (sideways)
- getting an Ah-ha from receiving appropriate and timely feedback

PROPOSITION: This organization promotes coaching and mentoring relationships and has an environment in which differences are valued.

19. **Awareness of self and others.**

- created a structure that places employees in a consulting role
- give rewards for team work
- where clash is over ideas rather than personalities
- role reversal exercises
- implementing Myers Briggs Type Indicator and like in organization
- recognizing and applying different decision-making styles as appropriate
- cross-training job shadowing - mentoring programs -
- social functions like company picnics and softball teams career coaches
- including the orientations of others in your thinking
- business integrating mechanisms

PROPOSITION: Employees understand that there are different working and decision-making styles. They understand each other's work needs. Opportunities are created to work and play together.

20. Valued what was learned.

- learning political realities
- where resources available to provide process
- when conflict is surfaced, open, and plans are made to deal with it
- by training a large group in the same skill the organization creates shared value of knowledge and opportunity to use skill
- interdisciplinary teams foster valuing, conflict, and interdependence

PROPOSITION: This organization values differences. Employees are encouraged to build a culture around shared information and apply new knowledge.

21. Learned in different ways.

- informal working relationship, lack of structure
- not legitimate/ team reporting relationship
- trust, belief that "I could do the job" (by supervisor)
- supplier/client - to meet their expectations and needs - understand (learn how to) their perspective
- (one-one) establish the relationship environment, resolve (potential) conflict, air differences

PROPOSITION:

REWARDS

incentives and 'punishments' within the organization

22. Having freedom, control, and/or choice.

- opportunity for promotion/development
- increased responsibility increases freedom and learning
- security leads to autonomy - increases learning
- providing flexibility so employees can work and learn at their own best time of day
- paying employees for taking initiative to take a course

PROPOSITION: The reward system is flexible. It recognizes individual differences in what motivates employees to work and learn.

23. Learning with and from others.

- group social gathering reward allowed development of deeper relationships

PROPOSITION:

24. External challenges and pressures

- recognition for extraordinary customer service - self esteem
- value on contribution, even if "difficult"
- celebration
- honours - contributions
- innovation rewarded as opposed to "formula"
- forced me to re-invent - do things in different way due to external constraints
- meaningful rewards
- fair rewards
- forced me to refocus - re-think
- reframed my perception of role - had to face some hard questions to external changes

PROPOSITION:

25. Being excited and stimulated.

- took initiative to better myself - I had a vision
- realized I had opportunity to grow
- felt organization trusted my ability to learn and contribute to organization
- It was recognized that I had something of value
- role modelling made explicit - others want to get on the wagon
- my peers got on fire - I had to jump on bandwagon
- recognizing of application of knowledge
- showing cause and effect
- being allowed to set own rewards stimulated advancement
- having rewards for all and clearly communicating them
- like a drug...got stimulated learning more, learned more by knowing I did O.K. in job
- empowered to create own learning experience
- distribution of bonus rewards based on peer reviews - which we had to create
- more learning - reward - stimulation- others (to go in circle with arrows)

PROPOSITION:

26. Awareness of self and others.

- given more organization recognized authority
- organization gave expectation to achieve (incentive)
- responsible for own learning
- past recognization (organize track record)
- given more opportunities (responsibility, authority)
- stated reward of promotion to receive more responsibility
- affirming the value of one's personal development
- wipe that glow off your face

PROPOSITION: This organization promotes individuals own responsibility for learning and rewards it by giving more opportunities for continuous learning and application.

27. Valued what was learned.

- recognize increased knowledge by being considered for promotion
- recognize increased knowledge by being given a chance to try another job temporarily
- when learning documented and distributed
- when learning valued in that it creates new opportunity
- opportunities to transfer learning
- publication in articles etc. of successes
- visits by others to your site

PROPOSITION:

28. Learned in different ways.

- provide incentives for trial and error problem solving
- when ideas are allowed to incubate/foster
- assigned as project leader - or to a project
- when different rewards recognize different ways of learning
- being rewarded for learning with an opportunity to learn more

PROPOSITION: This organization recognizes and rewards individual differences in learning.

APPENDIX C

FORTY-TWO PROVOCATIVE PROPOSITIONS

Provocative Propositions for SDL in Organizations

PURPOSE

1. **Having freedom, control and/or choice.**

   PROPOSITION: Learning occurs best when individual and organizational purposes converge and when the individual is able to meet the purpose in a way that is meaningful to the individual.

2. **Learning with and from others.**

   PROPOSITION: This organization promotes continuous improvement and learning as part of its strategy to define and achieve its purpose.

3. **External challenges and pressures.**

   PROPOSITION: This organization has a "stretch" vision that encourages employees to reach. Employees are committed to the organization's goals.

4. **Being excited and stimulated.**

   PROPOSITION: This organization has high congruency between individual and organizational values. People understand how their actions contribute to the organization's goals.

5. **Awareness of self and others.**

   PROPOSITION: This organization supports development of self-awareness and awareness of others as critical keys to gaining employee understanding and support of the organization's vision.

6. **Valued what was learned.**

   PROPOSITION: The organization involves people in defining and interpreting its purpose, and supports them in learning required to meet the purpose. People are encouraged to define individual goals and action plans to that end. The organization regularly reflects on its experience and modifies its purpose accordingly.

7. **Learned in different ways.**

   PROPOSITION: The organization encourages experimentation and searching for new ways of doing things.

STRUCTURE

8. **Having freedom, control and/or choice.**

   PROPOSITION: The structure is flexible allowing for the involvement of all stakeholders, while helping people to focus on desired outcomes.

9. **Learning with and from others.**

   PROPOSITION: An informal structure provides direct access to any organizational stakeholder.

10. **External challenges and pressures.**

    PROPOSITION: This organization's structure adapts and evolves beyond traditional boundaries.

11. **Being excited and stimulated.**

    PROPOSITION: People are actively involved in the design and evolution of the structure. Employees know and understand how their individual contributions support business objectives.

12. **Awareness of self and others.**

    PROPOSITION: This organization's structure conveys a certain value set which is in harmony with the employees' value sets. Management encourages individual input and multilevel feedback. Work is designed to foster collaboration.

13. **Valued what was learned.**

    PROPOSITION: The structure facilitates an informal, flexible environment that promotes the flow of information and sharing of ideas and experiences (learnings).

14. **Learned in different ways.**

    PROPOSITION: Organizational structure encourages uniqueness and gives freedom to learn and work in ways that are effective for both the individual and the organization.

RELATIONSHIPS

15. **Having freedom, control and/or choice**

    PROPOSITION: People at all levels feel secure to question, discuss, and provide input on any aspect of the business.

16. **Learning with and from others.**

    PROPOSITION: Learning is enhanced through relationships characterized by trust and mutual respect within a safe environment.

17. **External challenges and pressures.**

    PROPOSITION: External challenges and pressures are addressed collaboratively by all as an opportunity for learning and enhancing evolving relationships.

18. **Being excited and stimulated.**

    PROPOSITION: This organization promotes coaching and mentoring relationships and has an environment in which differences are valued.

19. **Awareness of self and others.**

    PROPOSITION: Employees understand that there are different working and decision-making styles. They understand each other's work needs. Opportunities are created to work and play together.

20. **Valued what was learned.**

    PROPOSITION: This organization values differences. Employees are encouraged to build a culture around shared information and apply new knowledge.

21. **Learned in different ways.**

    PROPOSITION: The organization provides a number of different stakeholder relationships which present different learning opportunities.

REWARDS

22. **Having freedom, control, and/or choice.**

    PROPOSITION: The reward system is flexible. It recognizes individual differences in what motivates employees to work and learn.

23. **Learning with and from others.**

    PROPOSITION:

24. **External challenges and pressures**

    PROPOSITION: Individuals are recognized and rewarded for their innovative responsiveness to opportunities brought about by change.

25. **Being excited and stimulated.**

    PROPOSITION: Rewards are given for having and applying knowledge. Employees have the power to create their own learning experiences and design rewards.

26. **Awareness of self and others.**

    PROPOSITION: This organization promotes individuals own responsibility for learning and rewards it by giving more opportunities for continuous learning and application.

27. **Valued what was learned.**

    PROPOSITION: The organization rewards learning by making opportunities available for the application and transfer of information.

28. **Learned in different ways.**

    PROPOSITION: This organization recognizes and rewards individual differences in learning.

LEADERSHIP

29. **Having freedom, control, and/or choice.**

PROPOSITION: Leadership in this organization facilitates employees by sharing decision making and trusting employees to do the job well. Individual initiative is valued.

30. **Learning with and from others.**

PROPOSITION: Leadership in this organization encourages everyone to learn from each other. Leadership fosters teamwork by setting an example and providing support.

31. **External challenges and pressures.**

PROPOSITION: Leadership encourages taking risks and trying new approaches.

32. **Being excited and stimulated.**

PROPOSITION: Leadership guides and supports in a way that is interactive, visible, accessible and not afraid to take risks.

33. **Awareness of self and others.**

PROPOSITION: Leadership actively encourages and models open sharing of new ideas among all levels of the organization.

34. **Valued what was learned.**

PROPOSITION: Leadership is creative itself, models learning values, and encourages innovation.

35. **Learned in different ways.**

PROPOSITION: Leaders in this organization value, recognize, and support different learning styles.

HELPFUL MECHANISMS

36. **Having freedom, control and/or choice.**

PROPOSITION: This organization has policies, procedures, and resources which promote not only technical excellence but also personal development.

37. **Learning with and from others.**

PROPOSITION: In this organization, systems and management practices create opportunities for working and learning together.

38. **External challenges and pressures.**

PROPOSITION: This organization focuses on continuous improvement. There is open and honest feedback across all levels. People work with guidelines to meet their commitments.

39. **Being excited and stimulated.**

PROPOSITION: This organization welcomes application of new concepts and creates opportunity for exploring outside organizational boundaries.

40. **Awareness of self and others.**

PROPOSITION: The organization provides helpful mechanisms which support authentic engagement and feedback at all levels so that the individual feels important to the process.

41. **Valued what was learned.**

PROPOSITION: This organization supports individual learning initiatives. It provides opportunities to apply and experiment with new skills/knowledge.

42. **Learned in different ways.**

PROPOSITION: Throughout this organization people encourage:
- sharing information
- processes supporting creativity and feedback
- taking risks

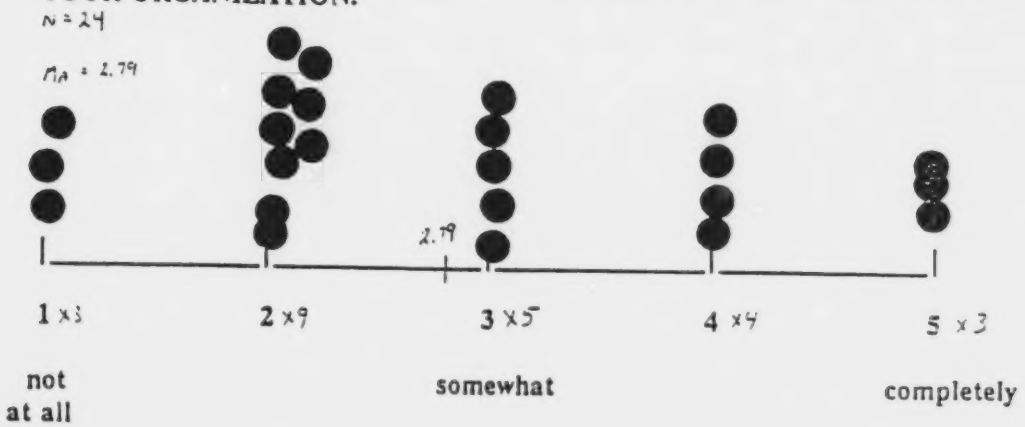
APPENDIX D

EXAMPLE OF GROUP VALIDATION SHEETS

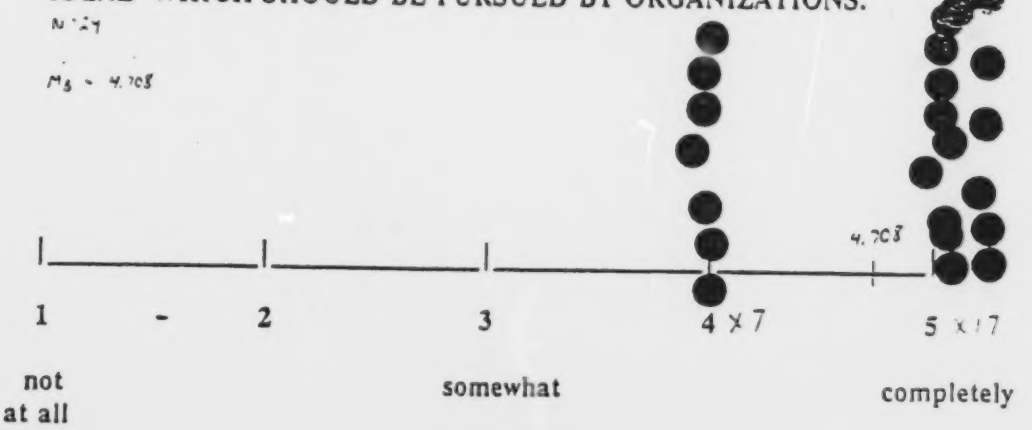
FOR ONE PROVOCATIVE PROPOSITION

THIS ORGANIZATION SUPPORTS DEVELOPMENT OF SELF-AWARENESS AND AWARENESS OF OTHERS AS CRITICAL KEYS TO GAINING EMPLOYEE UNDERSTANDING AND SUPPORT OF THE ORGANIZATION'S VISION.

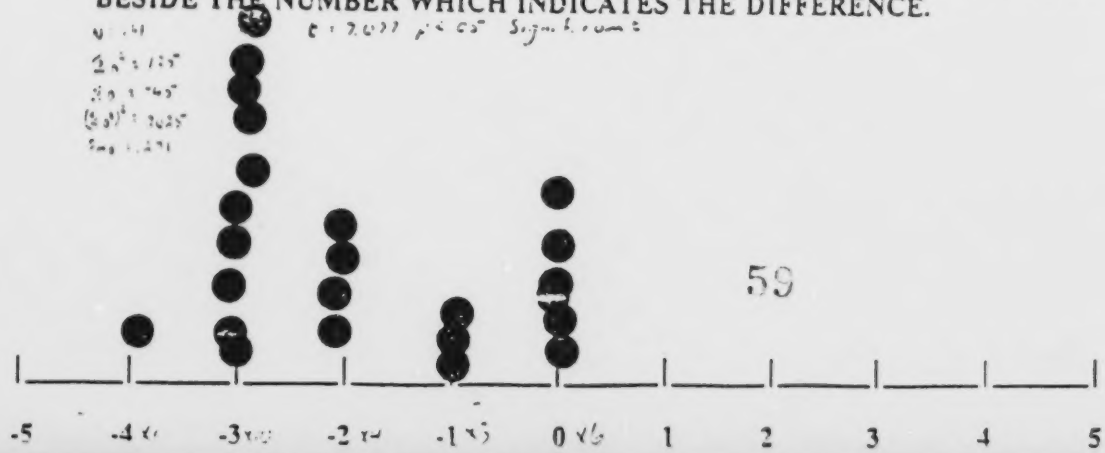
A. INDICATE THE EXTENT TO WHICH THE PROPOSITION CHARACTERIZES YOUR ORGANIZATION.



B. INDICATE THE EXTENT TO WHICH THE STATEMENT REPRESENTS AN "IDEAL" WHICH SHOULD BE PURSUED BY ORGANIZATIONS.



C. SUBTRACT THE SCORE FOR B FROM THE SCORE FOR A. PUT A DOT BESIDE THE NUMBER WHICH INDICATES THE DIFFERENCE.



APPENDIX E

SUMMARY OF THE PARTICIPANT EVALUATIONS OF THE SELF-DIRECTED LEARNING IN THE WORKPLACE PROJECT

EVALUATION OF SDL INQUIRY SESSIONS

A1. Overall, what I learned from this inquiry will be very useful to me.

	Scale Value	Freq.	Total	Descriptive Statistics
Strongly Disagree	1	1	1	N=15
	2	1	2	Mean=3.63
	3	2	6	Mode = 4
	3.5	1	3.5	Median = 4
	4	8	32	
Strongly Agree	5	2	10	
			54.5	

Comments:

A.I. was very interesting.
As a consultant, I didn't have an organization to work in.
All learning is useful, but did not learn a lot, more a confirmation of what I knew previously.
Only if I do something with it -- the potential is here.
Multiple perspectives on learning in the workplace enlightening.
How the process works and how it could be applied.
Direct my attention to what my organization is doing.
Excellent

A2. Overall, what I learned from this inquiry will be very useful to my organization.

	Scale Value	Freq.	Total	Descriptive Statistics
Strongly Disagree	1	0	0	N=14
	2	1	2	Mean=3.75
	3	4	12	Mode = 4
	3.5	1	3.5	Median = 4
	4	5	20	
Strongly Agree	5	3	15	
			52.5	
Not applicable		1		

Comments:

Not in an organization.
Potential.
Not sure I understand "appreciative" inquiry but am intrigued enough to puzzle out an application.
As I create my organization.....
A way of assessing organization's attitude toward learning.

A3. I can implement what I learned in this inquiry.

	Scale Value	Freq.	Total	Descriptive Statistics
Strongly Disagree	1	1	1	N=15
	2	0	0	Mean= 3.03
	3	4	12	Mode = 4
	3.5	1	3.5	Median = 4
	4	6	24	
Strongly Agree	5	3	15	
			45.5	

Comments:

I need to work on A.I. to make it useful in typical consulting situations.
Too early to tell -- likely in some modified manner integrated with other approaches.
Help managers identify when and how they are using self-directed learning.
Need more time to assess and plan and ascertain barriers.

A4. As the inquiry progressed, I felt more and more a part of the process.

	Scale Value	Freq.	Total	Descriptive Statistics
Strongly Disagree	1	1	1	N=15
	2	2	4	Mean=3.0
	3	2	6	Mode = 4
	4	8	32	Median = 4
Strongly Agree	5	2	10	
			45	

Comments:

Not really sure what appreciative inquiry method is.
N/A I only came to the last one.
I felt equally a part of it all along.
Lots of participation -- thanks!

A5. The inquiry was well planned and organized.

	Scale Value	Freq.	Total	Descriptive Statistics
Strongly Disagree	1	0	0	N=15
	2	1	2	Mean= 3.07
	3	4	12	Mode = 4
	4	8	32	Median = 4
Strongly Agree	5	2	10	
			46	

Comments:

Rough sometimes -- this is how learning is.
Good to see it evolve -- nice job.
Some parts, ie. 1st day, were not as well planned as the subsequent sessions.
I appreciate the efforts of those involved -- this was a learning opportunity.
Improved greatly from session 1 to 3.
Size of the group and time constraints had a negative effect.
Thanks, very well organized.

A6. The key information which we need ed to carry out this inquiry was provided to us.

	Scale Value	Freq.	Total	Descriptive Statistics
Strongly Disagree	1	0	0	N=15
	2	1	2	Mean= 4.0
	3	1	3	Mode = 4
	4	10	40	Median = 4
Strongly Agree	5	3	15	
			60	

Comments:

Recognizing the problems of pre-planning and norming in an evolving process.
Process generated.
Appreciated mailings

B1. What were the strengths of this program?

Work group approach -- action - doing - I definitely taught the message.
Was a unique learning experience for me.
Participants involvement.
Group participation. Ability to react to change.
Inquiry process.
Participation adherence to expectations. Sharing the process.
Do it using appreciative inquiry. Not having a tight finish - leaving it open-ended.
Participant involvement.
The varied participants.
Flexibility of facilitators. Structure of the process and having a steering committee to work on process between sessions.
The participative nature. Getting people involved quickly. The mix of people - backgrounds, organizations, etc.
Participation from all the people which generates different feedback to light up some of the unsolved questions.
Participation. Willingness to experiment. Great group.
Having input from a variety of different types of people from different backgrounds.
Meeting others.

B2. If you were in charge of planning and organizing this program next time, what would you do differently to improve it?

O.K.
More time on what appreciative inquiry method is.
Keep first 2 sessions better timed. Limit number of participants.
Take it further - more on application - perhaps pilot organization.
Sessions closer together.
Not sure what to change. Concern that some people think that appreciative inquiry and SDL are the same thing.
Improve overall contexting. Enhance design. More on A.I.
Make it less complex. Instructions were often too cumbersome.
At beginning - give us more clear time frames of how much time we'll spend on exercises. Eg. Working the Walls (I went for a coffee break because I thought it was finished after 20 minutes). [should refer to Affinity Charting]
Take into consideration the size of the group vis-a-vis the process used.
Allow more time to group discussion.
More "whys" at the beginning.
No idea.
More time.

B3. What do you plan to do with the learning you have gained from participating in this program?

Think about it and implement where of value. I can think of one specific incident immediately to implement.
___ and take this information and look for more SDL experiences and ways that I can use it with staff _____ the organization.
Share with my peers.
Help my clients learn to be learners.
Use A.I. more effectively. Use provocative propositions.
Look at the process I am using and use this notion to challenge my own assumptions.
Not sure yet.
Not sure yet.
Not sure.
Maybe implement A.I. with a client.
Implement into my own further research and application.
Share the info with my company to help promoting the self-directed work team.
Use A.I. Talk about learning and SDL.
Not much.
Use it for myself and with a work group.

APPENDIX F

TEN ORGANIZATIONAL ENHANCERS OF SELF-DIRECTED LEARNING

1. How Organizations Enhance Self-Directed Learning

In terms of the research project we could have stopped the process at the point where the propositions were generated. A content analysis of the provocative propositions produced a list of enhancers of self-directed learning as identified by the participants. The propositions were created from statements about the actions that organizations take which create environments in which employees are enabled and motivated to learn. Therefore, looking for themes amongst the provocative propositions does reveal what the organization can do to enhance SDL.

The enhancers identified apply to more than self-directed learning in organizations. Many of these characteristics are also cited as factors in learning organizations and in good management practices.

Continuous Improvement (Propositions: 2, 6, 10, 26, 38)

Self directed learning is enhanced when continuous improvement is adopted as an organizational strategy. Participants reported optimal learning conditions when the organization uses feedback and reflection to evolve beyond traditional boundaries. Employees benefited when they were encouraged in personal continuous improvement.

Involving Individuals (Propositions: 4, 6, 8, 9, 11, 15, 17, 25, 29, 32, 40)

Employees learn best when they are informed of and able to contribute to the larger organizational picture. They need to know how their actions contribute to the organization's goals and that their input is valued.

Taking Personal Responsibility (Propositions: 26, 29, 36, 41)

The organization can be a context which stimulates learning. Learning occurs within the individual. Learning is maximized when the individual takes control of and responsibility for his/her learning. Individuals are encouraged to take this responsibility when the organization rewards and supports personal learning initiatives.

Harmonious Values (Propositions: 4, 12)

Participants reported enhanced learning when the values underlying the organization's structure and purpose were in harmony with the individual's values.

Leadership Setting an Example (Propositions: 30, 33)

Learning by example is a powerful process. Managers and supervisors have an impact on everyone in the organization. Learning was enhanced by leadership which set an example.

Valuing Differences (Propositions: 14, 16, 18, 19, 20, 22, 28, 35)

Valuing differences enhances learning by providing acceptance, trust, and mutual respect. Under these conditions employees can feel uninhibited about offering Xadifferent perspective or solution. Also motivating, were rewards which reflected individual differences.

Communication (Propositions: 9, 12, 13, 15, 20, 40, 42)

Effective communication systems are necessary for learning to occur. Current and relevant information promotes learning and appropri te performance. Three aspects of communication were highlig ed by the participants: (a) a broad network including all organizational stakeholders, (b) flexible, supportive structures and processes, and (c) a supportive culture.

Taking Risks (Propositions: 7, 20, 25, 27, 31, 32, 33, 39, 41, 42)

Organizations which support risk-taking provide a good environment for learning. Support means leadership, systems, and processes encourage exploring, creating, experimenting, and applying new ideas.

Teamwork (Propositions: 12, 17, 19, 30, 37)

Teamwork enhances learning by providing opportunities to take on larger challenges, learn from others, and see relationships between different aspects of the organization's work. The organization can enhance learning by fostering collaboration in work and play.

Innovation (Propositions: 24, 34, 39, 42)

Enabling employees to innovate stimulates learning. Organizations can encourage learning by implementing rewards and processes which support creativity and innovation.